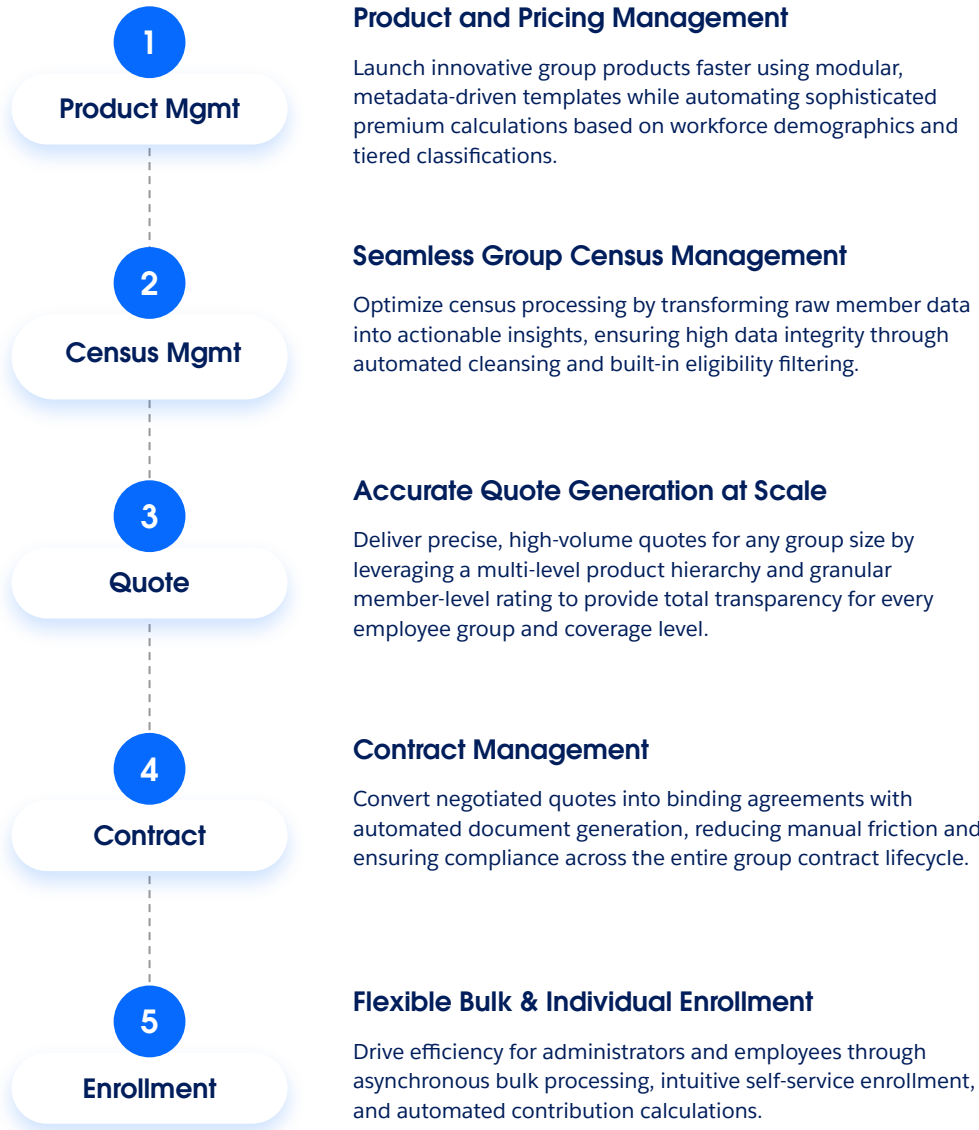




Automate your entire group benefits value chain on a single platform.

Here's how Group Benefits works.



What is it?

A single, unified, agentic platform providing a holistic view of the group benefits lifecycle. Automate your entire value chain, from plan design, rating, quote and contract generation to enrollment, on a configurable system built for scale.

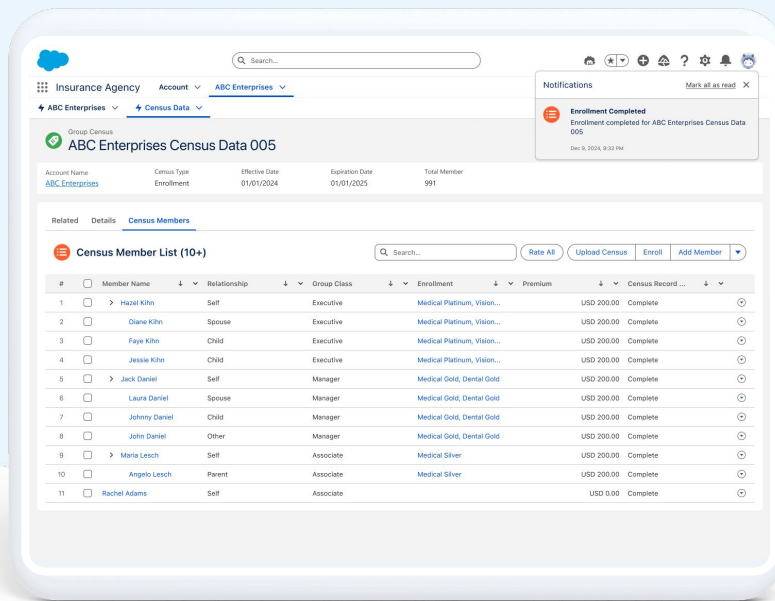
How can it help your business?

- Accelerate speed-to-market**
Launch complex group products and riders in days rather than months.
- Scale operational efficiency**
Automate high-friction processes, from bulk census ingestion to contract generation, to reduce administrative overhead.
- Elevate the member experience**
Deliver a modern, digital-first enrollment journey that empowers both employers and employees.

[Digital Insurance](#) includes allocations to get you started with Policy Administration, Claims Management, and Group Benefits.

Have questions about Group Benefits? Contact us at 1-800-667-6389 to learn more or please visit sfdc.co/digitalinsurance

Group Benefits



Modular Product Templates

Accelerate speed-to-market by leveraging reusable product components with shared attributes and streamlined customization capabilities.

Intelligent Pricing & Rating Rules

Deliver precise quotes using deep demographic insights and flexible simulation tools to optimize risk assessment and pricing accuracy.

Group Class Management

Streamline benefits eligibility by configuring logical workforce segments and tiers within a unified administration interface.

Census Member Data Bulk Ingestion

Simplify complex data migrations by effortlessly importing and cleansing large-scale employee rosters into a centralized, actionable view.

Granular Member Control

Drive administrative precision by managing individual employee records, life events, and preferences with high-fidelity detail.

Employee Eligibility and Plan Assignment

Automate complex enrollment logic by dynamically determining eligibility and assigning tailored plans based on unique business criteria.

Error Handling and Reporting

Maintain data integrity with real-time validation and intuitive reporting tools designed to identify and resolve discrepancies instantly.

Quote Configuration

Master complex plan structures by configuring coverages and attributes across a dynamic, multi-level product hierarchy.

Product Rules Execution

Enforce business logic consistently by automatically triggering eligibility and configuration rules throughout the quoting lifecycle.

Comprehensive Rate Analysis

Gain instant visibility into premium breakdowns at every level—from the total group down to the individual member.



Contract Creation

Convert won opportunities into binding agreements seamlessly, reducing manual overhead and ensuring document accuracy.

Bulk Enrollment

Handle high-volume enrollment periods with ease using asynchronous processing, automated error handling, and status notifications.

Automated Member Onboarding

Transform raw census data into active customer records automatically to accelerate the transition from prospect to policyholder.

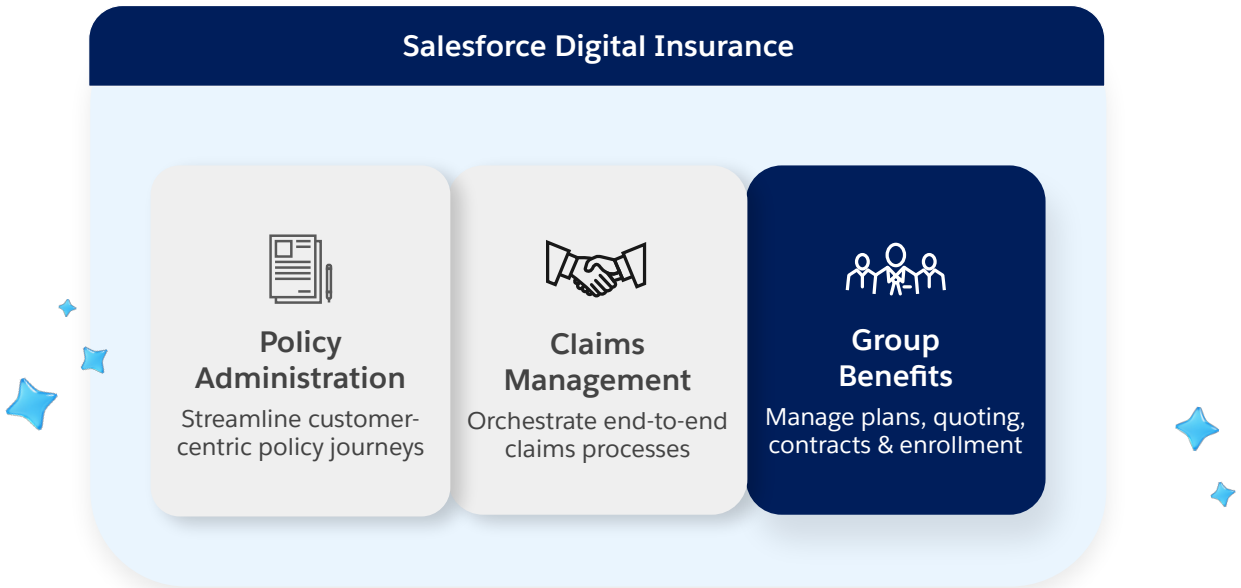
Individual Enrollment

Empower members with intuitive self-service tools, providing a modern, frictionless enrollment experience for every employee.

Employee-Employer Contributions

Define and calculate complex cost-sharing models with precision to ensure accurate billing and financial transparency.

Salesforce Digital Insurance



Consolidate and streamline core insurance operations on Salesforce’s Digital Insurance Platform. Harmonize core insurance processes with modern digital engagement, unified customer data, and trusted, intelligent automation on a single unified platform.

[Digital Insurance](#) includes allocations to get you started with Policy Administration, Claims Management, and Group Benefits.

[Watch the demo.](#)

Learn more about Group Benefits at sfdc.co/digitalinsurance